SmartStream Coordination Meeting Minutes
October 5, 2004

Attendance: Sophia Bedard; Pete Bostian; Ed Green; Randy Keller, Beth Kelly; Mel Lambert; Lori Smith; Mark Testerman; Karen Toms

1.   Year-End Processing: Pete noted that year-end processing was accomplished with no problems.

2.   Journal Posting: Pete reported that he had contacted Cheryl Ahalt about changing the journal ID's of the journals created from non-SmartStream activities – labor, shared services, warehouse transactions and Pcard - so that the source of the data would be immediately apparent from the journal ID rather than from the journal item descriptions. She agreed that it would be useful particularly since data selection by these ID's will be included in a new web report that will soon be available. The new report will replace a GEAC SmartStream Access report and will enhance data selection to obtain journal summaries by posting dates, effective dates and/or data type.   This report will be especially helpful now that Pcard data is being posted daily.

Beth noted that the sales tax journals that she creates already have a journal ID of OSTAX. Pete said that he was unaware of this but that the ID would fit within the new scheme. C&SS will modify the journals for labor, shared services and warehouse. The Pcard journals will have to be created and then modified since we do not have access to the code. Pete stated that he could add this modification to the Pcard modification request previously prepared to change the way default centers are handled. Lori noted that no action has been done on this request as Purchasing is waiting on a resolution to how their buyers can use the Pcard system to resolve SmartStream requisitions.

3.   Web reports: Lori reported that several of the web reports were not as useful as their Access predecessors. These included the past due purchase order report where PO line information was deleted, and the open blanket order report where the order quantity and usage was deleted. Pete explained that the reports had links back to the missing information and that they were designed for real-time inquiries, not necessarily for reference or archival purposes. Another purpose for the reports was to expand the end-user's data selection capability and to satisfy some of the Purchasing Departments' subcontracting plan initiatives. He said that he and Ed would either modify the reports or create new ones to correct the problem.

4.   Data archiving: Mel reminded everyone that we are preparing to archive contract year 2001 data. Pete noted that Sophia will be working with Al on the data archive procedures so that there will be continuity for next year's processing. Karen noted her concern that invoices were archived for existing purchase orders.   Pete stated that he was not too surprised since Accounts Payable and Purchasing are two separate applications. He was more concerned for the receipt that got archived for a purchase order that was open. Mel said that GEAC indicated that the receipt should not have been archived. So far this is the only problem that has been identified with the archive procedure and Pete noted that GEAC supplied scripts to restore the archived data to the production databases. Mark inquired whether the test server should be reloaded with production data prior to the archive. Pete replied that we would have to coordinate that with Al and that it should not be done next week since Lori has several training sessions planned.

The next meeting will be held Tuesday, November 2, 2004, at 9 AM in the Building 362 conference room.